

## Module 11

### Chapter 2

## Entering Contact Information

### Chapter Overview

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**Introduction** This chapter explains the process of entering contact information that may or may not lead to a complaint record. For example, an employee comes into your office to discuss an event that has occurred, but is not submitting anything formal at this time.

This process is a means of storing data on all contacts and saves time. If the employee comes back to pursue further action, the record can easily be queried and updated to the pre-complaint or formal complaint stage.

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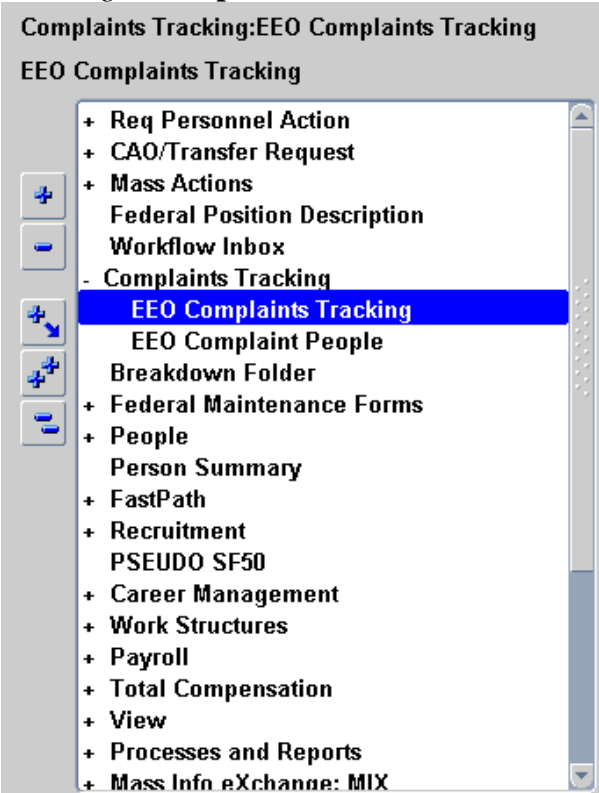
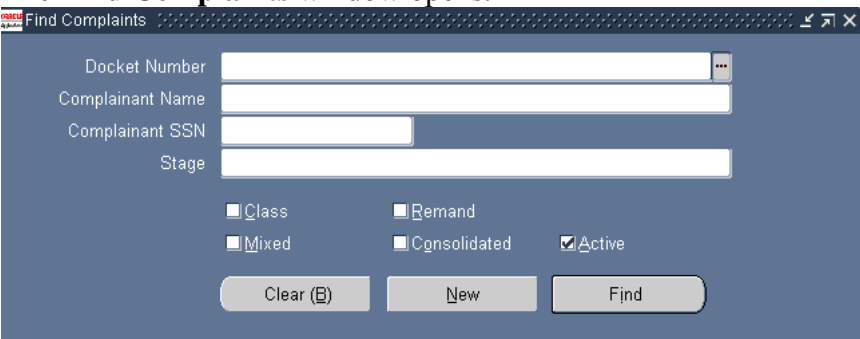
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# Entering Contact Information

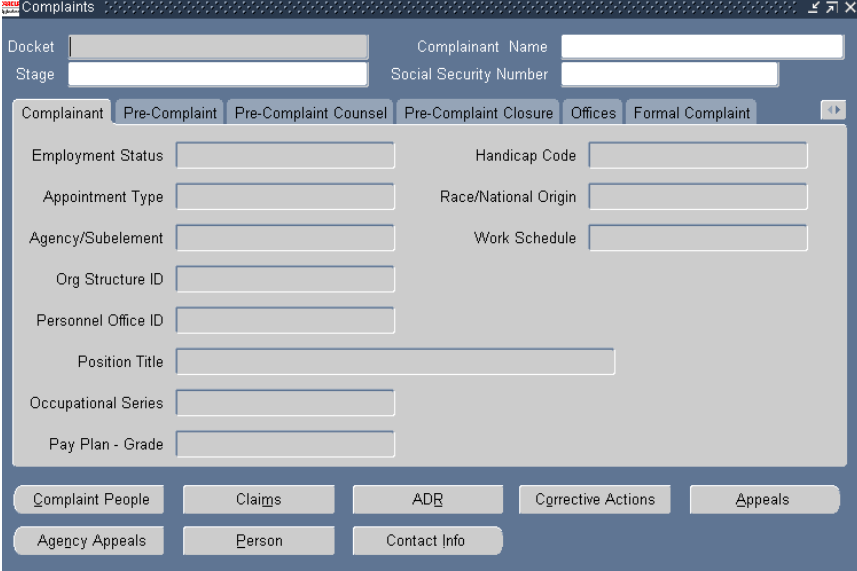

## Accessing the Find Complaints Window

Step	Action
1	<p><b>Navigation Path</b>, <i>Complaints Tracking</i> → <i>EEO Complaints Tracking</i> → <b>&lt;Open&gt;</b>.</p> 
2	<p>The <b>Find Complaints</b> window opens.</p>  <p>Click the <b>&lt;New&gt;</b> button.</p>

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## Entering Contact Information, Continued

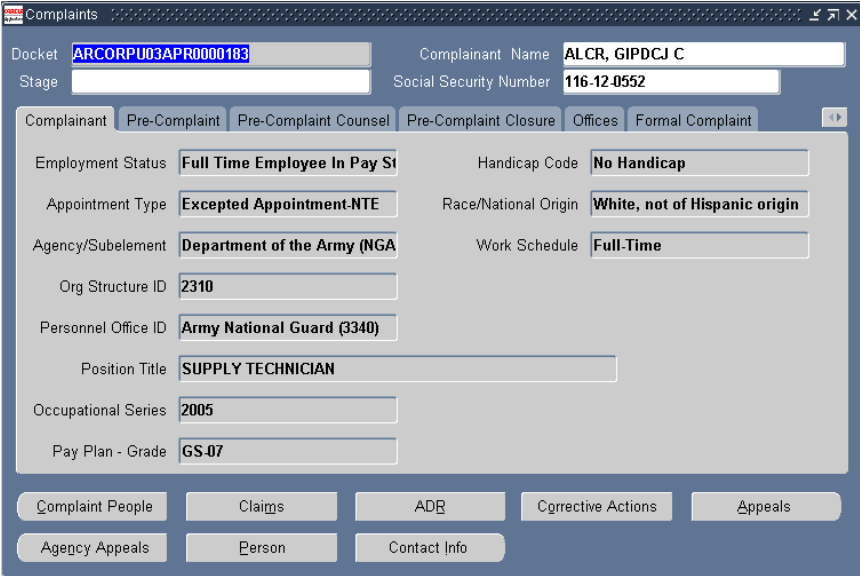

### Completing the Complaints Window

Step	Action
1	<p>In the <b>Complaints</b> window, complete the header information:</p> 
1	<p>In the <b>Complainant Name</b> data field, use the LOV to select the person's name. On the <b>Enter Reduction Criteria for Long List</b> message box, enter:</p> <ul style="list-style-type: none"> <li>• % sign for a list of all the names in the database; or</li> <li>• The first letter of the last name with a % sign. For example, "A%" opens the names that begin with an "A."</li> </ul> <p>The <b>Social Security Number</b> data field auto-populates if it exist within the record.</p> <p> <b>Note:</b> If the person is not in your database, you must return to the <b>Navigation List</b> and select <i>EEO Complaint People</i> to build a limited person record so the name will display in the LOV icon</p>

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## Entering Contact Information, Continued

### Completing the Complainant Region

Step	Action
2	<p>Once you select a name, the <b>Complainant Alternate Region</b> automatically populates with existing information if the employee is currently in the database. If not you can capture information on the external user here</p> 
	<p>Click the <b>Save Icon</b>  on the Toolbar.</p>
	<p>To <b>Exit</b> the record:</p> <p>Click <b>File</b> on the Toolbar → <b>Close Form</b> (to return to the <b>Navigation List</b>).</p> <p><i>Or</i></p> <p>Click <b>File</b> → <b>Exit Oracle Applications</b> to close out of Oracle and return to the Desktop.</p> <p><i>Or</i></p> <p>Click the <b>"X"</b> in the upper right-hand corner of the window or the small red Oracle Icon in the upper left-hand corner of the window.</p> <p><b>Note:</b> The record is now ready for querying and updating to a pre-complaint or formal complaint stage</p>

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## Attaching a Document (Customized for CATS)



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### Purpose

This section guides you through the steps to attach, view, print, and delete an attachment to a complaint record.

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### Before You Begin


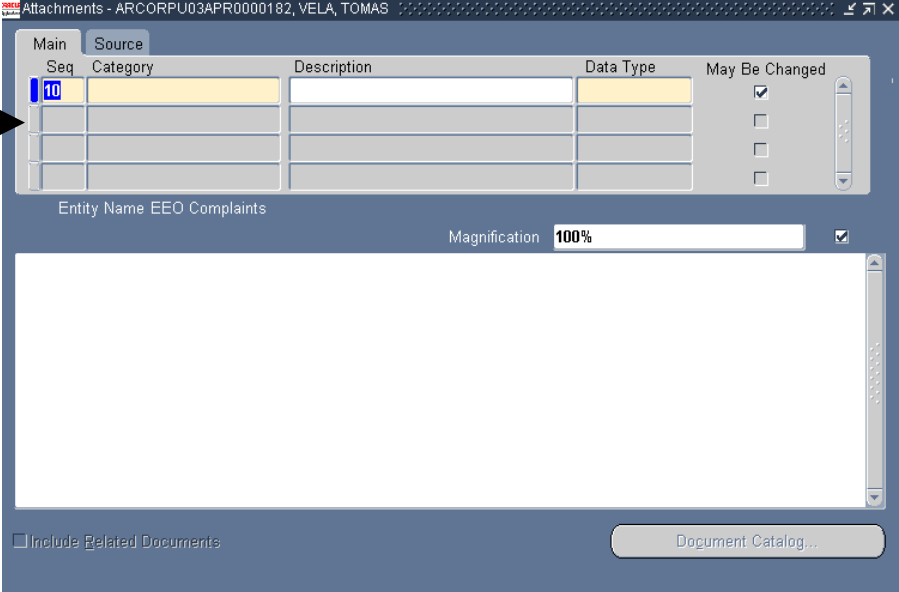
- You can attach short comments, word documents, images, or Web pages to many records. For example, you can attach your notes while capturing Complaints Action Tracking (CATS). When the **Attachments** button  is enabled, it is a solid paper clip.
- The paper clip changes to a paper clip holding a paper  after an attachment has been added to a record. The bottom half is white.
- Each record can have one or more attachments.
- You can copy attachments from one record to another.
- You can store the attachments in the database or in your file system in the Document Catalog.
- Follow this path to access the CATS **Complaints** window:
  - **Navigation List** → *Complaints Tracking* → *EEO Complaints Tracking* → **<Open>**.
  - The **Find Complaints** window opens. Click the **<Find>** button. This will query all complaint records to which you have access.
  - The **Complaints** window opens with the first complaint record in the database displayed.
  - Use the Up and Down Arrow Keys to scroll to the record you need to add an attachment.

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## Attaching a Document (Customized for CATS), Continued

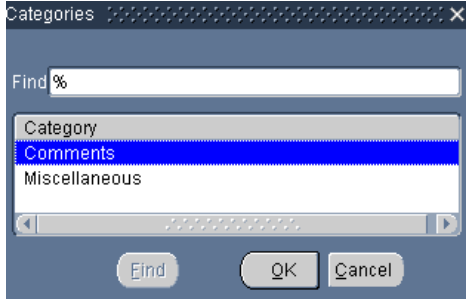
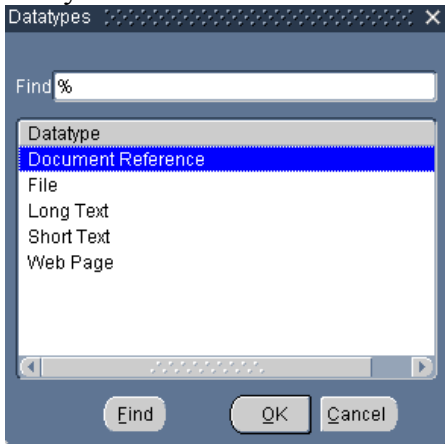
### Attaching a Document

Step	Action
1	In the <b>Complaints</b> window, click the Attachments  button on the Toolbar.
2	<p>The <b>Attachments</b> window opens. The <i>Seq</i> number is system-generated. <i>Main</i> or <i>Source</i> which are alternative regions that give you more options/segments to determine what kind of attachment you have. With your cursor in the <i>Category</i> data field, click the LOV.</p> 

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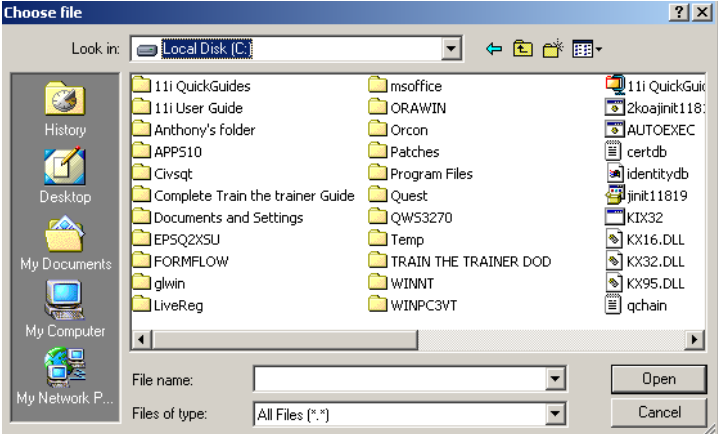
## Attaching a Document (Customized for CATS), Continued

### Attaching a Document

Step	Action												
3	<p>The <b>Categories</b> window opens. Select <i>Comments</i> or <i>Miscellaneous</i> and click the &lt;OK&gt; button. <i>Comments</i> have been selected for illustration purposes.</p> 												
4	<p>In the <b>Description</b> data field, type the information you want to attach, such as the name of a word document. This is a free flow text field of 255 characters. [Tab] to the <b>Data Type</b> data field.</p>												
5	<p>With your cursor in the <b>Data Type</b> data field, click the LOV icon to Select the format for your data and click the &lt;OK&gt; button.</p>  <table border="1"> <thead> <tr> <th>Data Type</th><th>Description</th></tr> </thead> <tbody> <tr> <td><b>Document Reference</b></td><td></td></tr> <tr> <td><b>Long Text</b></td><td>Used when <i>Comments</i> is selected and stores up to 2000 characters of text.</td></tr> <tr> <td><b>File</b></td><td>Represents a document – word, power point, etc. in the text area.</td></tr> <tr> <td><b>Short Text</b></td><td>Contains less than 2000 characters of test.</td></tr> <tr> <td><b>Web Page</b></td><td>A URL reference that you can view with your Web browser. You must define your Web browser to view a Web page attachment.</td></tr> </tbody> </table>	Data Type	Description	<b>Document Reference</b>		<b>Long Text</b>	Used when <i>Comments</i> is selected and stores up to 2000 characters of text.	<b>File</b>	Represents a document – word, power point, etc. in the text area.	<b>Short Text</b>	Contains less than 2000 characters of test.	<b>Web Page</b>	A URL reference that you can view with your Web browser. You must define your Web browser to view a Web page attachment.
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# Attaching a Document (Customized for CATS), Continued

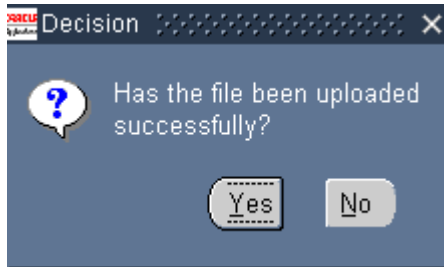

## Attaching a Document

Step	Action
6	<p><b>File</b> data type was selected for this example. Click the Browse button to locate the File you wish to attach. After locating the File click the &lt;OK&gt; button</p> <p><b>ORACLE</b></p> <p>Upload a File</p> <hr/> <p>File</p> <p><input type="text"/> Browse...</p> <p>OK Cancel</p>
	<p>Select the file of choice click the &lt;Open&gt; button</p> 
7	<p>A upload file will appear click the &lt;OK&gt; button</p> <p><b>ORACLE</b></p> <p>Upload a File</p> <hr/> <p>File</p> <p><input type="text" value="C:\11i User Guide\Table of Contents.doc"/> Browse...</p> <p>OK Cancel</p>



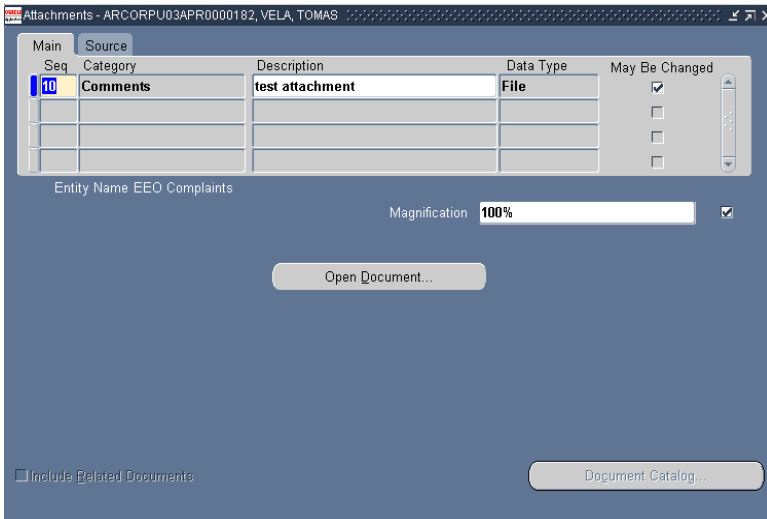
## Attaching a Document (Customized for CATS), Continued

### Attaching a Document

Step	Action
8	<p>A successful Upload file window will appear simply close the window by clicking the <b>X</b> in the upper right corner</p> <p><b>ORACLE</b></p> <p>Upload a File</p> <hr/> <p>File upload completed successfully.</p> <p>* Please close the web browser.</p> <p>* Return to the Attachments form and click the Yes button to indicate file upload is complete.</p>
9	<p>A decision box will appear asking if the file Upload was successful Click the &lt;Yes&gt; button</p> 
10	Click the <b>Save</b> icon and close window
11	<p>Next time you query the record  the attachment icon will show a document present.</p>

## Attaching a Document (Customized for CATS), Continued

### Reviewing Your Attachment



Step	Action
1	Exit the <b>Complaints</b> window and return to the <b>Navigation List</b> .
2	<p>Access the <b>Complaints</b> Window again.</p> <ul style="list-style-type: none"><li>• <b>Navigation List</b> → <i>Complaints Tracking</i> → <i>EEO Complaints Tracking</i> → <b>&lt;Open&gt;</b>.</li><li>• The <b>Find Complaints</b> window opens. Click the<b>&lt;Find&gt;</b> button.</li><li>• The <b>Complaints</b> window opens with the first complaint record in the database displayed.</li></ul> <p>Use the Up and Down Arrow Keys to scroll to the record you added an attachment to</p>
3	The <b>Complaints</b> window opens the Paper Clip with the white paper (bottom half of Paper Clip is shaded) indicating there is an attachment:
4	Click the Paper Clip icon to review your attachment notes.
5	<p>The <b>Attachments</b> window opens. Use the scroll bar to locate the <i>Seq</i> and <i>Category</i> you need to view and print.Click the <b>&lt;Open Document&gt;</b> button</p> 

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## Deleting an Attachment

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### Deleting an Attachment


Step	Action
1	After selecting the action which has an attachment you want to delete, click the Attachment  button on the Toolbar.
2	The <b>Attachments</b> Window opens. Use the left scroll bar to select the <b>Seq</b> number you want to delete in the <b>Attachments</b> Window. Click the Delete Record  button on the Toolbar.
3	A Message Box opens and asks, “Delete only attachment or delete both document and attachment?” Click < <b>A</b> ttachment> or < <b>D</b> ocument and Attachment>
4	A second Message Box opens and states, “You must save your work on the attachment before continuing. Select AutoSave to automatically save each attachment change.”  Click < <b>A</b> utoSave> or < <b>S</b> ave> and exit the window.

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## Copying an Attachment from Another Record

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### Copying An Attachment

Step	Action
1	Query the record that you want to attach a document. Do NOT query the record that already has the attachment.
2	With the record open, click <Attachments> on the Toolbar. The <b>Attachments</b> Window opens.
3	Click <Document Catalog>. The <b>Document Catalog</b> Window opens. With your cursor in the <i>Attached To</i> data field, click the LOV and select the application object or enter the query criteria for the one you need.
4	Click <Find>. Check one or more documents and click <OK>.
5	Click <Attach 1>.
6	Click Save on the Toolbar  .

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